ISIS HR Reporting

See Introduction to ISIS HR Reporting in the On Line help for detailed information

Reporting Overview

- A report is a collection of specific data extracted from the ISIS HR database to provide information required for making decisions.
- Reports can be generated as needed and as often as necessary.
- ISIS HR reports are designed to be viewed on-line and may be printed if hardcopy documentation is required.
- Reports in ISIS HR are "real time" reports. That is, they pull the selected data from the system, as it is occurring in ISIS HR.
- Reports in ISIS HR have various distinct functions and some reports perform more advanced processes than others. For example, some reports contain count buttons that allow you to count the information contained in a particular column. Other reports contain a "further processing options" section that specifies options for exporting the report into a Microsoft Word or Excel file.
- Fixed Layout reports are traditional reports and are also referred to as Standard reports in ISIS HR. These have specific output that is organized in a precise, pre-programmed method. ISIS HR does not allow you to significantly manipulate the output of these reports.
- Flexible reports are new reports in ISIS HR that allow you to manipulate almost every part of the report input and output. Flexible reports are known as "ad hoc" reports.
- Reports will fall into one or more utilization categories: Informational & Statistical, Audit & Exception, and Date Monitoring. Utilization categories are used as a way to index reports for the State. The State of Louisiana Reports Manual, located on the State of Louisiana web-site, uses these categories to give you proper descriptions of each report and instructions on how to execute each report successfully.

Accessing ISIS HR Reporting

There are two methods that you can use to locate a report. Use either the Report Tree or a transaction code.

- The Report Tree is contained within the SAP Easy Access menu. This allows you to drill down from an overall reporting topic such as Human Resources, to a more specific topic level such as Payroll, and then finally to access the desired specific payroll report.
- A transaction code allows you to access a report directly without following a menu path. Transaction codes for reports have smart coding so that one type of report is easily distinguished from another.
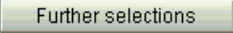
Selection Criteria

Selection criteria is information used in generating a report that enables you to better define the employee/ data pool that will be included in the report. The employee population may be narrowly defined or as broad as the State's entire employment base depending on your selected criteria.

For your selection criteria, you can specify single values or ranges of values to be included within or excluded from the report. By modifying the selection criteria, you can generate the same report for different populations of employees.

- Click on ▬➡ to include or exclude multiple values or value ranges within the selection criteria.
- Tabs marked with a green light, are used for selecting multiple values to be included in the report selection criteria.
- Tabs marked with a red light, are used to exclude values from the selection criteria.
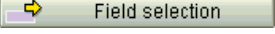- Click to clear all selection criteria.

Some flexible reports will allow you to add additional fields to the selection criteria.

- Click **Further selections** (if available) to select any additional fields to be included in the report.

Click on the desired field to select it. Then use the following buttons to customize the selection criteria for your report.

- click ▶ to move a field to the selection criteria.
- click ◀ to remove a field from the selection criteria.
- click ▶| to move all of the available fields to the selection criteria.
- click |◀ to remove all of the selection criteria fields.
- click to sort in ascending or descending order.
- click ▲ ▼ to change the order in which the selection criteria will appear.

Some Flexible Reports also allow you to customize additional fields for the report output.

- Click **Field selection** (if available) to select any additional fields to be included in the report output.

Variants

Standard Variants have been created for reports that have specific requirements. A Standard Variant is a template of input information, which can include the relevant date parameters, selection criteria, sorts, and report output fields.

- Standard Variants ensure that the report automatically contains the correct information for its intended use.
- OSIS will initially create Standard Variants, but you will also have the capability to create specialized variants for any of the reports as well.
- All Standard Variants may also contain one or more "Display Variants". Display Variants are saved versions of the report output. You can manipulate columns, spacing, data, and sorts, and then save this manipulated version with a smart code that contains a long text description.

There are three sources for variant help:

1. On-line help for individual reports and reporting processes,
2. State of Louisiana Reports Manual located on the State's web site,
3. and the "Help" information in ISIS HR. Use these tools as needed to clarify variant questions.

To use a Standard Variant, follow the steps below.

1. Navigate to the report.
2. Follow the menu path **Goto >> Variants >> Get**.
3. Double click on the desired Variant.
4. Verify the selection criteria data and make any necessary changes.
5. Click to execute the report.

To create a variant, follow the following steps.

1. Navigate to the report.
2. Enter all selection criteria that is to be stored in the variant.
3. Follow the menu path **Goto >> Variants >> Save as variant…**
4. Enter the variant name (up to 14 characters in the **Variant name** field. The name should begin with your agency number. (For example: *107_Basicpay*)
5. Enter a brief description of the variant. in the **Description** field.
6. Click to save the variant.

Generating Reports

ISIS HR has been configured to timeout report generation after 5 minutes. If you are generating a report that takes longer than 5 minutes to process, or if you are uncertain about how long the report will take, generate the report using background processing by following the menu path **Program >> Execute in background**.

Click to process shorter report.

Customizing Report Output

Some reports also allow you to specify what data fields will be displayed in the report output. The report manipulation is much like an Excel spreadsheet. Items, such as hiding columns, sorting in ascending/descending order, drag and drop for column order, etc. are available to you.
Information can be exported to Microsoft Excel or Word for further report editing.

- To move a column, click on the column heading to select it. Then click and drag the column to the desired location
- To hide a column, right click on the column heading and select **Hide**.
- To show a column, right click on the report and select Show from the drop down menu. Select the desired field to be displayed. (*See Selection Criteria note for detailed steps*)
- To sort information, select the column to be sorted, then click on the desired sort key, [icons].
- To display a specific subset, select the column, then click [icon]. Enter the value or range of values to be included in the report.
- To export to Microsoft Excel, click [icon]. Select the radio button next to the desired format.

Note: To display the report as viewed in ISIS HR, select **Excel display**.

Note: Make sure to save your work in Microsoft Excel and/or Microsoft Word prior to exiting the program.

- To export the report to Microsoft Word, click [icon]. Select the radio button next to the desired format and Word settings.
- To save the report as a local file, click [icon]. Select the radio button next to the desired format. Then use the match code to select the destination of the saved file.
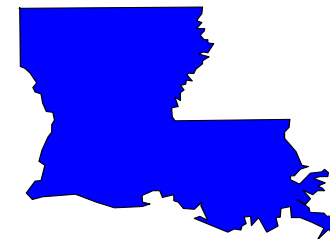
Note: Save using Rich text format to capture graphics and text.

- To print the report, click [icon]. Then select the output printer

Division of Administration
Office of Information Services
P. O. Box 94095
Baton Rouge, LA 70804-9095
Revised: 10/04

Graphic	*Results*
[icon]	Select a line, click this to see the source document or additional information about the data in the selected line.
[icon]	Click this button to print from ISIS HR.
[icon]	Click to select all of the documents in a document list.
[icon]	Click to deselect all of the documents in a document list.
[icon]	Use this button to perform a "match code" search to view all possible field values.
[icon]	Used to narrow a search to a keyword.
[icons]	Use these buttons to scroll to the first or last page within a large document or report.
[icons]	Use these buttons to scroll from page to page within a large document or report.
[icons]	Click to navigate between screens (or Infotypes) when performing an Action. **Note:** Changes to current screen are not saved until the [icon] button is selected and the message "Record changed" or "Record created" is displayed.
[icon]	Sort a list in ascending order.
[icon]	Sort a list in descending order.
[icon]	Select a variant.
[icon]	Allows you to use alternative options for searching for an item.
[icon]	Expand the menu.
[icon]	Collapse the menu.
[icon]	Use this button to refresh the screen.
[icon]	Allows you to delete a line or a document.
[icon]	Takes you to the delimit screen, or delimits a line document.
[icon]	Takes you to the display screen.

ISIS HR BASIC NAVIGATION BUTTONS AND REPORTING QUICK REFERENCE

Internet Address:
http://www.doa.louisiana.gov/ois

ISIS Help Line: 225/342-ANSR (2677)

Options:
#1   Human Resources
    #2   HR - Functional

Basic Navigation Buttons

Graphic	*Results*
[icon]	Takes you back one screen.
[icon] or [icon]	Either of these cancels the entries you have just made.
[icon]	Exit - leaves the current screen without saving.
[icon] or [icon]	Either of these will confirm that your entries are valid and in some cases move you to the next screen.
[icon]	Used to execute an Action or run a report.
[icon]	Save a record or document.
[icon]	Takes you to a change or maintenance screen, or if clicked after selecting a line, allows you to change the line document.
[icon]	Takes you to an overview of the document.
[icon]	Takes you to a copy screen, or if clicked after selecting a line, copies the line.
[icon]	Allows you to create a new document.